Sharpe Charitable Giving SUMMIT

January 17-19, 2024
DoubleTree Suites by Hilton Orlando-Disney Springs Resort Area
2305 Hotel Plaza Blvd.
Lake Buena Vista, FL 32830

The perfect way for your advancement team to begin 2024.

Spend three days with some of the most respected experts in the field of strategic gift planning. This training is ideal for those who are new to planned giving, while offering a “refresher” for more experienced fundraisers. We’ll explore the essential components of a successful gift planning program, offer a comprehensive examination of gift planning tools, explain the tax considerations of gifts of assets and present a wholistic view of fundraising strategies and tactics. You’ll enjoy interactive role-playing, case studies, networking and more.

Do you wish that your board and top management “understood” the intricacies of planned giving and charitable giving? We’ve got some perfect sessions designed for them. Invite them to join you in Orlando!

Agenda

Day One: Networking and How Gift Planning Works

7:45 EST **Check-in, Coffee and Light Breakfast**

8:15 EST **Introductions of Classmates and Faculty**

8:45 EST **Session 1—Developing a Wholistic Approach to Philanthropy**
Presenters: Barlow T. Mann, JD, Sharpe Group General Counsel and Joe Chickey, MBA, CFP®, Sharpe Group Senior VP and Senior Consultant
Beginning with answering "Who are you? Who are we? And why are we here?" we will present an overview of the Sharpe Wholistic® approach toward philanthropy to maximize fundraising success for the long term. This overview will provide insights on how to align these goals with strategies for 2024 and beyond. We will include a review of Charitable Gift Planners (CGP) standards and metrics.

9:30 EST **Session 1b—DC Update: Charitable Giving Legislation (& Some Regulations) (virtual)**
Presenter: Sara Barba, Principal, Integer, LLC., DC Nonprofit Legislative Lobbyist

10:00 EST **Break**

10:20 EST **Session 2—Taxes and Giving**
Presenter: Kristin Croone, JD, Sharpe Group Senior Consultant
A review of tax incentives past and present, who benefits from tax deductions, how tax deductions work and why people give with or without them**. It is always a good idea to keep updated and have a conversational knowledge of the latest trends in taxation to show your donors how to maximize the impact of their giving. We'll look into our crystal ball to see what's ahead.**

11:20 EST **Session 3—Planned and Blended Gifts in Capital Campaigns**
Presenters: Julie Schuldner, MBA, CFRE®, Sharpe Group Senior Consultant and Joe Chickey
What is the role of planned gifts in capital campaigns today? How should bequests, trusts and other deferred gifts be counted toward goals? Learn how to encourage gifts that are appropriate to the wealth level and life stage of donors in the context of a comprehensive campaign. Examine alternative approaches to valuing planned gifts and examples of excellent gift plans that can generate revenue within the time frame of a campaign and, in turn, blend those into your longer-term strategy.

12:20 EST **Lunch Provided for Networking and Table Discussions**
Attendees and presenters will enjoy a boxed lunch while continuing discussions that have arisen from the morning sessions.

1:40 EST **Session 4—Bequests and Charitable Gift Annuities**
Presenters: Joe Chickey and Kristin Croone
Charitable bequests have been growing incrementally in recent years and are likely to grow significantly as the Great Wealth Transfer begins to accelerate. Make sure you are reaching the right donors at the right time in their lives to make their gifts of a lifetime. A review of the tax treatment of charitable gift annuities, deductions, payments and various types of immediate and deferred payment charitable gift annuities. Participants will discuss current issues affecting program administration, best practices and state regulations.

2:40 EST **Break**

3:00 EST **Session 5—A Comprehensive Philanthropic Strategy**
Presenter: Bob Mims, CPA, CGMA, Sharpe Group CFO and Senior Consultant
Where is my organization today, and where are we headed? These are questions that are critical to any program, even if your role is not the one devising overall strategy. A roadmap discussion will walk you through why philanthropy is the engine that drives programs. Moreover, we'll present the importance of using benchmarking to assess where you are and what next steps your program should take to maximize your fundraising success. Specific ideas will be shared on how to best communicate this vision to leadership.

4:00 EST **Break**

4:20 EST **Session 6—Case Studies**

Presenter: Joe Chickey

We will present success stories with current clients in this interactive session. Each case is the result of several years of cultivation, and we will share how it evolved over time. As we work in small groups, you can share thoughts as well as listen to your new fundraising friends.

- Learn cues to listen for with your best prospects.
- Learn what key information is most important to gather.
- Identify what blended gift options might be the most suitable.
- Define best strategies for next steps.

5:20 EST **Conclude**

6:00 EST **Optional meet for dinner discussions (Dutch).**

Day Two: Critical Fundraising Tactics and Creating an Action Plan

8:00 EST **Networking, Coffee and Light Breakfast**

8:30 EST **Session 7—Knowing and Understanding Your Donors, Your People and You**

Presenter: Bob Mims

This session will focus on the fundamentals of understanding who we are as fundraisers, who our donors are and how to grow and develop both the givers and askers in this equation. This is a fun and lively module to begin the day.

9:30 EST **Break**

9:50 EST **Session 8—Charitable Remainder Trusts and Other Special Use Gifts**

Presenters: Joe Chickey and Barlow Mann

An overview of qualified charitable remainder trusts since the *Tax Reform Act of 1969* and what you need to know about charitable remainder annuity trusts and various types of charitable remainder unitrusts. How are they alike and how are they different? We will also cover lead trusts, QCDs and beneficiary designations.

10:50 EST **Break**

11:10 EST **Session 9—Looking and Listening for Gifts in All the Right Places**

Presenter: Julie Schuldner

Are we good listeners? If we have the right data and are ready to invest in donor resources over the long term, how might we discover the right gift structure that exceeds expectations for both the donor and the organization? Seven myths will be dispelled to assist in making you a better listener, and you'll learn simple listening techniques that build relationships and donor trust.

12:10 EST **Lunch on Your Own**

1:30 EST **Session 10a—Review and Discussion of 2023 Tax Changes and Their Impact (virtual).**
Presenter: Kathy Sperlak, Editor of the Sharpe Charitable Giving Tax Service (CGTS)

2:00 EST **Session 10—The Aspects and Components of Stewardship**
Presenter: Julie Schuldner
Nearly 70% of realized bequests are just simple bequests. This module will tackle the touchpoints and best practices in marketing to your donor pool in two different funnels: simple bequests and more complicated higher-wealth strategies. Segmenting your data in ways to be specific and provide a customized approach to your donor family can build longer trusting relationships and bring returns to your organization.

3:00 EST **Break**

3:15 EST **Session 11—The Strategic Approach to Philanthropy**
Presenters: Bob Mims and Matt Czyl, Sharpe Group Senior Consultant
Diving into the data and demographics is made fun by looking at generations and generational giving. This module will focus on the long-term approach that successful planned giving programs use in understanding their donor data while marrying this analysis to the key relationship investment required to steward major and planned gifts. Balancing your resources between the data and the relationship is critical in planning a philanthropic strategy that outlives multi-year campaigns.

4:15 EST **Break**

4:30 EST **Session 12—Creating and Maintaining an Effective Communication and Touch-Point Plan**
Presenters: Kristin Croone and Matt Czyl
Ending the day with another interactive approach to learn tips and ideas for how to engage planned giving donors in sincere and authentic ways.

5:30 EST **Conclude**

6:00 EST **Optional meet for dinner discussions (Dutch).**

Day Three: Ethics, Endurance, Methods, Measurement

8:00 EST **Networking, Coffee and Light Breakfast**

8:30 EST **Session 13—Are You Prepared for Changing Economic Times?**
Presenters: Bob Mims and Barlow T. Mann
Changes in the economy are assured. Planned giving is the great mitigator of economic risk and uncertainty in major giving. Here, we'll examine the relationship between the world's economy and its influence on our donors in the short and long terms. We will discuss market influences while taking a look at the remainder of 2024 and what to look for in 2025.

9:30 EST **Break**

9:50 EST **Session 14—Integrating and Measuring CGP Standards**
Presenters: Joe Chickey and Kristin Croone
Most strategic plans fail for two reasons: they either aren't actually measured or don't provide goals that can be measured. This session will dive into the CGP standards and provide a framework from which you can measure your results. Measuring and reporting results to your leadership can lead to more resources to invest in your program.

10:50 EST **Break**

11:10 EST **Session 15—Best Practices of Ethics, Policies and Procedures**
Presenters: Kristin Croone and Julie Schuldner
Experience builds habits in an organization. Documentation of your ethics, core values, policies and even procedures provides a consistent tool to measure how you are doing while building donor trust.

12:10 EST **Lunch on Your Own**

1:30 EST **Session 16—Analyzing, Segmenting and Measuring "Good" Data**
Presenters: Julie Schuldner and Joe Chickey
This session will cover how to keep your data records fresh while making data work for you to maximize time and resources. In this session, we'll present a case study where data was used effectively.

2:30 EST **Session 17—The Art of The Ask**
Presenter: Joe Chickey
This session will methodically walk through the stewardship process toward the ultimate ask. Timing, tips and tactics will be covered.

3:30 EST **Break: The 7th-Inning Strech**

3:40 EST **Session 18—What Are Your Best Takeaways?**
Presenters: Joe Chickey, Kristin Croone, Barlow T. Mann, Bob Mims, Julie Schuldner, Matt Czyl
This interactive concluding session will provide three to four takeaways to keep top of mind when you return to your organization.

4:40 EST **Adjourn**

Hotel Information

DoubleTree Suites by Hilton Orlando – Disney Springs Resort Area

2305 Hotel Plaza Blvd.
Lake Buena Vista, FL 32830

If you need hotel accommodations, please call the DoubleTree Suites reservations office at 407.934.1000 and ask for the "Sharpe Group" rate or click here. We have negotiated a group rate of $169 per night, which will be in effect for reservations made through Dec. 17, 2023, subject to availability. This special rate will be available for use from Jan. 13 through Jan. 22. Please be aware that if the reserved block of rooms sells out before this date, your rate may be higher. Also, parking charges may apply on the hotel premises.